

Retroactive Adjustment Roadmap

Patient Liabilities & Client Obligations

- 1) Make sure the situation merits changing the liability/obligation for the past paid benefit month.
- 2) Determine which months are affected and the appropriate liability/obligation amount for each month. You can do this either on the system or off-system, but be sure you document in the case log regardless of the method you use.
- 3) Communicate with your supervisor (or the designated person in your area who has a supervisory profile within MMIS) the need to make the retroactive adjustment. If you are unsure if a retroactive adjustment is appropriate, talk with your supervisor before making the changes.
- 4) Access the **LOT**C screen on the KAECSSES system and screen-print the current coding information.
- 5) Change the coding on **LOT**C to reflect the correct liability/obligation for the affected month, screen-print **LOT**C, and enter through the screen. Repeat this process, if more than one month is being changed retroactively, until all affected months have been adjusted.
- 6) Enter the current **LOT**C coding information (see step #4 above) onto the screen.
- 7) Send notices to the consumer and facility or case manager indicating the change.
- 8) The following business day, you will receive an alert on **WOAL**, "MMIS Retro PL chg pending". The person in your office with supervisory profile in MMIS will need to access the MMIS system, go to the Pending Patient Liability window, and authorize the retroactive adjustments. If an adjustment was made in the KAECSSES system in error, the information will be deleted from the pending file after 90 days without supervisory approval or have your supervisor access the window and delete the pending change.
- 9) Delete the "MMIS Retro PL chg pending" alert on **WOAL**.